

Core Question 3: Is the organization effective and well run?

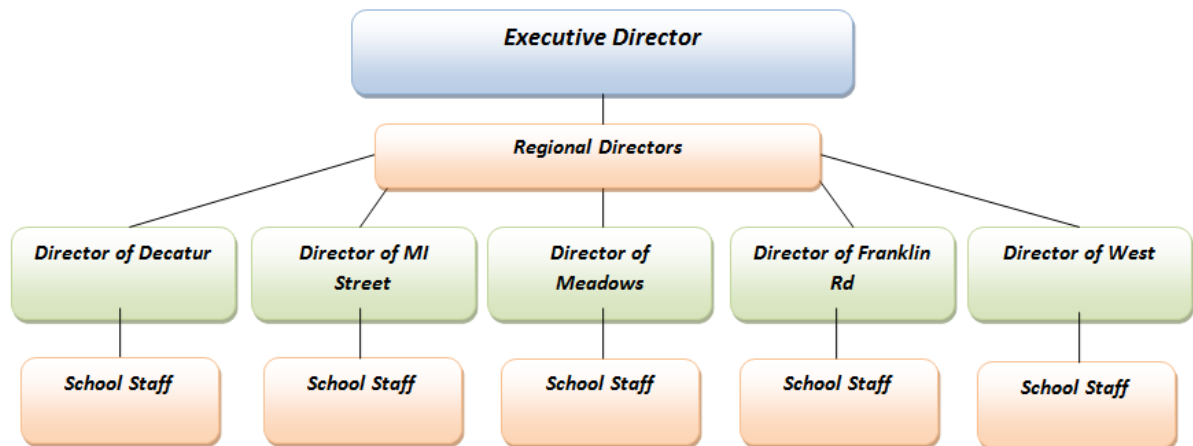
The Governance and Leadership Performance Framework, outlined in Core Question 3, gauges the academic and operational leadership of schools. Core Question 3 consists of five indicators designed to measure schools on how well their school administration and board of directors comply with the terms of their charter agreement, applicable laws, and authorizer expectations.

3.1. Is the school leader strong in his or her academic and organizational leadership?							
Indicator Targets	Does not meet standard	The school leader presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.					
	Approaching standard	The school leader presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.					
	Meets standard	The school leader complies with and presents no concerns in the sub-indicators below.					
	Exceeds standard	The school leader consistently and effectively complies with and presents no concerns in the sub-indicators below.					
3.1 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS						
Sub-indicator Ratings	Sub-indicators						Rating
	Demonstration of sufficient academic and leadership experience						ES
	Leadership stability in key administrative positions						AS
	Communication with internal and external stakeholders						ES
	Clarity of roles among schools and staff						MS
	Engagement in a continuous process of improvement and establishment of systems for addressing areas of deficiency in a timely manner						ES
	Consistency in providing information to and consulting with the schools' board of directors						MS

With a network that oversees nine schools across the state of Indiana, the Excel Center has developed a robust leadership team to effectively manage school operations. After experiencing turnover in the Director position, the staff was reorganized to better serve the growing network of schools. The Executive Director, a former teacher, coach, and school director with the Excel Center, was hired mid-year to oversee the strategic planning, goal setting, and management of leaders at the school and regional level. A Regional Director works closely with the School Director in data analysis, problem solving, and professional development. The School Director manages the day-to-day operations of the school and is responsible for implementing network-wide

initiatives. He has several years of teaching and school leadership experience and has been with the Goodwill Education Initiatives (GEI) staff, which provided additional supports including finances, operations, data, and academics. Although the Excel Center experienced a mid-year turnover in the Director position, the Excel staff was able to manage the interim responsibilities, select a replacement, and effectively transition with very little disruption to school operations. The Excel Center West employs the TAP program, which outlines clear roles and responsibilities for teachers and leaders. Additionally, roles and responsibilities of the Executive Director, Regional Director, and School Director were clearly elaborated in their day to day activities.

Organizational Chart



Internally, the School Director maintained frequent communication with his staff and participated in regular meetings with the Regional Director and other School Directors. The Executive Director and Regional Manager were responsible for the majority of communications with external stakeholders, including the board of directors, Board Chair, Mayor's Office (OEI), GEI, and community partners. Together, they have developed meaningful community partnerships (particularly through local businesses and universities) to directly provide services and supports to the school and its students. The Executive Director provided a thorough report to the board of directors at every meeting that included sections on multiple measures of school performance. Information was consistently accurate, relevant, and timely, and allowed the board to react appropriately to school performance.

The Executive Director, Regional Director, and School Director consistently reflected on several areas of school data to inform day-to-day decisions. Excel Center West opened in 2013-2014 and had to anticipate a lot of unknowns about the student population that would be attending. Once a facility was selected, the School Director was able to focus on ensuring students were receiving meaningful learning experiences. From the first to the third term, the school was able to offer several additional classes, allowing students to stay full time and earn more credits per term. Additionally, to meet the credit needs of more students, the School Director took advantage of technology to offer virtual class options across campuses. Leaders at all levels consistently considered the challenges that their students faced and how they could best support their efforts to receive a meaningful high school education.

Overall, the school and network leadership was consistently effective in its organizational and academic oversight and receives a [meeting standard](#) for this indicator.

3.2. Does the school satisfactorily comply with all its organizational structure and governance obligations?							
Indicator Targets	Does not meet standard		The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.				
	Approaching standard		The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.				
	Meets standard		The school complies with and presents no concerns in the sub-indicators below.				
	Exceeds standard		The school consistently and effectively complies with and presents no concerns in the sub-indicators below.				
3.2 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS						
Sub-indicator Ratings	Sub-indicators						Rating
	Submission of all required compliance documentation in a timely manner as set forth by the Mayor's Office, including but not limited to: meeting minutes and schedules, board member information, compliance reports and employee documentation						AS
	Compliance with the terms of its charter, including amendments, school policies and regulations, and applicable federal and state laws						MS
	Proactive and productive collaboration with its board and/or management organization (if applicable) in meeting governance obligations						MS
	Active participation in scheduled meetings with OEI, including the submission of required documentation by deadlines						MS

For the first half of the 2013-2014 school year, the Executive Director was responsible for submitting compliance documents to the Mayor's Office (OEI). While all documents were submitted and all governance obligations were met, there were several occasions when documents were submitted late. Upon transition, these responsibilities were delegated to a Regional Manager. She was able to establish better systems and processes for submitting documentation and since then, submission time has significantly improved. Currently, the Regional Manager works with the schools and GEI staff to ensure documents (including employee spreadsheets, quarterly reports, and board minutes) are collected, correct, and submitted in a timely manner.

Additionally, the Excel Center maintained compliance with all material sections of its charter and submitted amendments as necessary. The Executive Director, Regional Directors, and School Directors were consistently actively engaged in meetings with OEI and maintained frequent communication with OEI between scheduled meetings. For these reasons, The Excel Center is meeting standard for compliance obligations.

3.3. Is the school's board active, knowledgeable, and does it abide by appropriate policies, systems, and processes in its oversight?							
Indicator Targets	Does not meet standard		The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.				
	Approaching standard		The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.				
	Meets standard		The school complies with and presents no concerns in the sub-indicators below.				
	Exceeds standard		The school consistently and effectively complies with and presents no concerns in the sub-indicators below.				
3.3 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS						
Sub-indicator Ratings	Sub-indicators						Rating
	Timely communication of organizational, leadership, academic, fiscal, or facility deficiencies to the Mayor's Office; or when the school's management company (if applicable) fails to meet its obligations as set forth in the charter						MS
	Clear understanding of the mission and vision of the school						MS
	Adherence to board policies and procedures, including those established in the by-laws, and revision of policies and procedures, as necessary						ES
	Recruitment and selection of members that are knowledgeable, represent diverse skill sets, and act in the best interest of the school and establishment of systems for member orientation and training						ES
	Effective and transparent management of conflicts of interest						MS
	Collaboration with school leadership that is fair, timely, consistent, and transparent in handling complaints or concerns						MS
	Adherence to its charter agreement as it pertains to governance structure						MS
	Holding of all meetings in accordance with Indiana Open Door Law						MS

The board of directors for the Excel Center West is active, experienced, and provides competent oversight for the schools. The board is comprised of individuals with experience in finance, government, education, business, nonprofit leadership, real estate, and community engagement. In an effort to ensure alignment, two representatives from Goodwill Initiatives of Central Indiana (GICI) reside on the board as non-voting, ex-officio members. Many of the directors have served with GICI for several years, as membership has remained very stable.

A review of meeting minutes and notes demonstrates the board's clear understanding of and commitment to the school's mission of providing adults the opportunity and support to earn a high school diploma and begin post-secondary education while developing meaningful career paths. Given that Excel Center serves a unique population, the state's standard evaluation system did not provide a comprehensive assessment of the school's performance. However, the board, along with school leadership and the Mayor's Office, worked to develop meaningful goals and targets for Excel that would demonstrate successful student outcomes. Board members maintained high expectations of the schools' performance, but remained supportive and understanding of the unique school configuration and challenges. The board met every other month and consistently met quorum, with the majority of directors in attendance.

Skill Sets Represented on Board

Education



Business/
Marketing



Finance



Real Estate



Community



Board Overview

Goodwill Education Initiatives, Inc. holds the charter for the Excel Center.

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Members

majority

Required for Quorum

The Excel board meets bi-monthly.

Goodwill Education Initiatives, Inc. operates 9 Excel Centers across Indiana as well as Indianapolis Metropolitan High School.

The leadership team at the Excel Center and the Chief Operating Officer (COO) of GEI handled the majority of communication between the board and the Mayor's Office and were proactive in communicating updates and concerns with both parties. No deficiencies or concerns were raised to OEI that were not proactively communicated in regular meetings and documentation.

Regarding governance operations, the board maintained compliance with its bylaws throughout the course of the year with regular review of bylaws, director terms, and committee structures noted in meeting minutes. Meetings were held as scheduled, met quorum, and abided by Indiana Open Door Law. No conflicts of interest were noted during the 2013-2014 school year.

Due to consistent leadership and stewardship of the board of directors, the Excel Center West is meeting standard for board governance.

3.4. Does the school's board work to foster a school environment that is viable and effective?							
Indicator Targets	Does not meet standard		The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.				
	Approaching standard		The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.				
	Meets standard		The school complies with and presents no concerns in the sub-indicators below.				
	Exceeds standard		The school consistently and effectively complies with and presents no concerns in the sub-indicators below.				
3.4 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS						
Sub-indicator Ratings	Sub-indicators						Rating
	Regular communication with school leadership and/or its management company						MS
	Annual utilization of a performance based evaluation to assess its own performance, that of the school leader, and management organization (if applicable)						AS
	Collaboration with the school leader to establish clear objectives, priorities, and goals						MS
	Interaction with school leader that is conducive to the success of the school, including requesting and disseminating information in a timely manner, providing continuous and constructive feedback, and engaging the school leader in school improvement plans						MS

The Excel Center board held semi-monthly meetings in which many stakeholders, including representatives from GICI, the Executive Director, Regional Directors, and other relevant staff members, provided thorough reports on school performance. Between meetings, the Executive Director communicated with the COO for GEI and the board chair when necessary to provide leadership and support in school initiatives and events.

The GEI and Excel Center staffs created and managed rigorous priorities and goals for the school. At each board meeting, they provided data to demonstrate the school's progress towards achieving the goals and received feedback from the board. Additionally, the Executive Director met individually with the COO, board chair, and other board members throughout the year to receive more formal feedback and support. At the close of the school year, the COO provided a formal evaluation of the Executive Director, while the Executive Director evaluated the Regional Director and School Director. Currently, the board does not have a formal method of setting goals for itself or assessing its own performance, making it difficult to objectively gauge its own effectiveness at the end of the year.

In all observed meetings and interactions, the board, network, and school leadership teams appeared to have a positive and productive working relationship. The Executive Director and COO were self-reflective and proactive, allowing for relevant and transparent meetings that demonstrated a constant commitment to school improvement. For all of the reasons described above, the Excel Center is meeting standard for school and board environment.

3.5. Does the school comply with applicable laws, regulations, and provisions of the charter agreement relating to the safety and security of the facility?							
Indicator Targets	Does not meet standard		The school presents concerns in a majority of the sub-indicators with no evidence of a credible plan to address the issues.				
	Approaching standard		The school presents concerns in a minimal number of the sub-indicators and may or may not have a credible plan to address the issues.				
	Meets standard		The school complies with and presents no concerns in the sub-indicators below.				
	Exceeds standard		The school consistently and effectively complies with and presents no concerns in the sub-indicators below.				
3.5 Rating	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Year 7
	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	2019-20
	MS						
Sub-indicator Ratings	Sub-indicators						Rating
	Health and safety code requirements						MS
	Facility accessibility						MS
	Updated safety and emergency management plans						MS
	A facility that is well suited to meet the curricular and social needs of the students, faculty, and members of the community						MS

In 2013-14, the Excel Center West facility met all health and safety code requirements and provided a safe environment conducive to learning. Although they had to utilize mobile units while renovations were being done, they took all proper safety precautions. The design, size, maintenance, security, equipment and furniture of the facilities were all adequate to meet the school's needs. The school was accessible to all, including people with physical disabilities. The Mayor's Office monitoring of Excel Center West's compliance with health and safety code requirements did not reveal any significant concerns related to these obligations. Accordingly, it is meeting standard for this indicator for 2013-14.